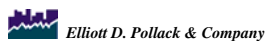




The Cactus League

Economic and Fiscal Impact
(Excluding Tourism Impacts During Spring Training)

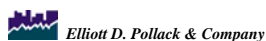
Presented By:
Jill Welch
Elliott D. Pollack & Company



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The Cactus League = Not just Spring Training

- Extended spring training
- Rookie leagues
- Fall leagues
- Instructional leagues



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The Cactus League

Represented by 10 Stadiums & 15 teams

Cactus League Stadiums and Teams 2011		
Stadium	Team(s)	Year Opened
Glendale Stadium	Chicago White Sox LA Dodgers	2009
Goodyear Ballpark	Cleveland Indians Cincinnati Reds	2009
Maryvale Baseball Park	Milwaukee Brewers	1998
Mesa Hohokam & Fitch Park	Chicago Cubs	1997
Peoria Sports Complex	San Diego Padres Seattle Mariners	1994
Phoenix Municipal Stadium	Oakland Athletics	1964
Scottsdale Salt River Fields	Colorado Rockies	2011
Scottsdale Stadium	Arizona Diamondbacks San Francisco Giants	1992
Surprise Recreation Campus	Kansas City Royals New York Rangers	2003
Tempe Diablo Stadium	Los Angeles Angels	1968

Source: Elliott D. Pollack & Company, Cactus League



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The Cactus League

Stadium Events

- Men's Senior Baseball League
 - NABA
 - USA Baseball
 - USSSA Baseball tournaments
 - Fantasy camps
 - Perfect Game
 - Junior College Series
 - Coast to Coast Baseball Camp
 - North American Spring Training
 - Wolves' Classic Tournament
 - Western Athletic Conference Tournament
- etc...



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The Cactus League

Non-Baseball Stadium Events

- MMA
- Commercials
- Races
- Concerts
- Festivals

etc...



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Economic & Fiscal Impact of the Cactus League Baseball Association 2011 (Excluding the Tourism Impact during Spring Training)

1. Stadium operations impact – the jobs, wages and economic output created in operating each of the ten stadiums.
2. MLB Team Visitor Impacts – the impact of the spending of the Major League Baseball Associations throughout the year.
3. Stadium Events Visitor Impacts – the impact of the visitation created by events held at the Cactus League Stadiums.



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Methodology

- Surveys conducted and returned by each stadium.
- Data included:
 - Operating data (jobs, wages, expenses)
 - Team visitation and spending
 - Stadium events
 - Length of event
 - Estimated visitors from out-of-state
- Total spending categorized into type of spending and used as the economic & fiscal impact model input.



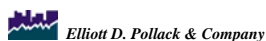
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Operations Impact

Stadium Operations Economic Impact	
Jobs	
Direct	276
Indirect	141
Induced	110
Total	527
Wages (\$ mil)	
Direct	\$8.8
Indirect	\$6.7
Induced	\$5.6
Total	\$21.1
Output (\$ mil)	
Direct	\$24.9
Indirect	\$16.8
Induced	\$15.7
Total	\$57.4

Source: Cactus League Stadium Surveys; EDFCo; Implan.



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MLB Associations Impact

Assumptions for Team Spending Average based on Survey Results					
	Players	Coaches / Staff	Days	Room nights	
Spring Training	225	80	45	6,500	
Extended Spring Training	80	30	50	2,750	
Rookie League	70	20	30	1,350	
Instructional / Summer League	70	20	30	1,350	
Fall League	30	5	50	875	

Source: Surveys of Cactus League Stadiums; EDPCo



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MLB Associations Impact

Total Team Spending by Type 2011		
Type	Spending	% of Ttl
Lodging	\$14.2	38%
Food & Beverage	\$10.3	28%
Entertainment	\$3.0	8%
Transportation	\$2.8	8%
Retail	\$7.1	19%
TOTAL	\$37.4	100%

Note: Average of all teams
Source: Surveys of Cactus League Stadiums



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MLB Associations Impact

Team Spending Economic Impact	
Jobs	
Direct	491
Indirect	85
Induced	139
Total	715
Wages (\$ mil)	
Direct	\$14.8
Indirect	\$4.8
Induced	\$7.0
Total	\$26.7
Output (\$ mil)	
Direct	\$37.4
Indirect	\$12.9
Induced	\$19.8
Total	\$70.2

Source: Cactus League Stadium Surveys; EDPCo; Implan.

Stadium Events Impact

Assumptions for Multi-Stadium Events 2011							
Event	Teams	Players / team	Attendees / team	Days	Visitor Days	Percent OOS	Net Visitor Days
MSBL	350	25	N/A	18	8,750	90%	7,875
MSBL World Serie:	50	25	N/A	5	1,250	90%	1,125
NABA	275	25	N/A	18	6,875	90%	6,188
USA	72	20	10	12	2,160	80%	1,728

Source: The Cactus League

Stadium Events Impact

Games per Stadium 2011			
Event	MSBL	NABA	USA
Glendale Stadium	79	-	72
Goodyear Ballpark	136	79	-
Maryvale Baseball Park	148	26	-
Hohokam & Fitch Park	69	9	-
Peoria Sports Complex	43	-	72
Phoenix Municipal Stadium	115	17	-
Scottsdale Salt River Fields	100	30	-
Scottsdale Stadium	10	-	-
Surprise Recreation Campus	74	-	72
Tempe Diablo Stadium	111	101	-

Source: The Cactus League



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Stadium Events Impact

Stadium Event Visitor Spending by Type		
Type	Spending	% of Tot
Lodging	\$14.0	31%
Food & Beverage	\$12.2	27%
Entertainment	\$3.7	8%
Transportation	\$6.6	15%
Retail	\$8.0	18%
TOTAL	\$44.6	100%

Note: Data for 2011
Source: Surveys of Cactus League Stadiums



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Stadium Events Impact

Stadium Events Economic Impact	
Jobs	
Direct	605
Indirect	96
Induced	169
Total	870
Wages (\$ mil)	
Direct	\$18.5
Indirect	\$5.5
Induced	\$8.6
Total	\$32.5
Output (\$ mil)	
Direct	\$44.6
Indirect	\$14.6
Induced	\$24.1
Total	\$83.3

Source: Cactus League Stadium Surveys; EDPCo; Implan.



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Economic Impact Summary

Economic Impact of the Cactus League 2011				
Impact Type	Stadium Operations	Cactus League Teams	Stadium Events	TOTAL
Jobs				
Direct	276	491	605	1,372
Indirect	141	85	96	322
Induced	110	139	169	417
Total	527	715	870	2,111
Wages (\$ mil)				
Direct	\$8.8	\$14.8	\$18.5	\$42.2
Indirect	\$6.7	\$4.8	\$5.5	\$17.0
Induced	\$5.6	\$7.0	\$8.6	\$21.1
Total	\$21.1	\$26.7	\$32.5	\$80.3
Output (\$ mil)				
Direct	\$24.9	\$37.4	\$44.6	\$106.9
Indirect	\$16.8	\$12.9	\$14.6	\$44.4
Induced	\$15.7	\$19.8	\$24.1	\$59.6
Total	\$57.4	\$70.2	\$83.3	\$210.9

NOTES
The total may not equal the sum of the impacts due to rounding.
Source: Elliott D. Pollack & Company; Cactus League; IMPLAN



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Fiscal Impact

The public revenue generated by a particular economic activity.

Major Revenue Sources

- Primary = Utility taxes, materials sales taxes, retail sales taxes, bed taxes, car rental taxes.
- Secondary = Revenues generated by the employees that support the activity (sales taxes, property taxes, income taxes...)



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Fiscal Impact Summary

Fiscal Impact of the Cactus League 2011			
	Primary	Secondary	Total
State	\$4,267,330	\$2,468,900	\$6,736,230
County	\$1,356,070	\$1,017,900	\$2,373,970
Local Governments	\$2,942,400	\$1,207,000	\$4,149,400
Total	\$8,565,800	\$4,693,800	\$13,259,600

Sources: Cactus League Stadium Surveys; IMPLAN; ATRA; EDPCo



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